

# 2022 ANNUAL REPORT

Richard III Society Inc., American Branch



## 2022 Annual Report from Chair

Susan Troxell

I chaired all ten of the meetings of the Board of Directors in 2022, including those for routine business and for the 2022 GMM. I worked closely with those planning the GMM to provide insights gathered when planning the 2020 GMM. I regularly communicated with the UK Richard III Society on matters affecting our membership, and provided articles about our branch for the *Ricardian Bulletin*. I advocated for procurement of D&O insurance to protect our officers and directors from personal liability, worked closely with our officers to create the current Bylaws, and advocated for creating a Google Shared Workspace where organizational documents may be retained and be easily accessible for current and future Board members and officers.

With our new website (r3.org) going “live” in 2022, and with the popularity of the virtual Zoom platform, I look forward to coming up with ideas to engage our membership, create a larger social media presence, and make joining our branch attractive to new audiences. This will involve a balance of preserving our traditions against using newer technologies and strategies. It has been my privilege to serve as chair and I am grateful for the opportunity.

## 2022 Secretary’s Report

Sally Keil

Owing to a relatively quick succession, Jean Aquino and Justin Smith tendered their resignations as secretary for personal reasons. At the August 8, 2021 board meeting a motion was made and seconded to appoint Joan Szechtman as interim acting secretary until the next election of the membership. Subsequently, Joan Szechtman attended and submitted minutes for a mix of 11 board and GMM planning meetings that were held on Zoom.

At the 2022 GMM during the business meeting on October 29, 2022 Sally Keil was elected secretary of the American Branch.

## 2022 Annual Report from the Membership Chair

Wayne Ingalls

Membership totals for the Richard III Society, American Branch had an overall increase in membership in 2022 from 329 to 356 members. In early 2022, the Richard III Society, CLG, in the UK began mailing Membership ID cards to CLG members in the American Branch. This is the first time that Membership ID cards from the UK have been sent to American Branch members, and indicates that we are indeed considered full members in the Richard III Society, CLG. The Membership ID numbers are the method in which American Branch members can register to attend the UK's Zoom presentations.

Mailings of the quarterly *Ricardian Bulletin* and the Annual *Ricardian* continue to be sent directly to American Branch members from the UK, with extra copies sent to me as the Membership Chair. The numbers of lost or missing publications from the UK has decreased dramatically, but it does reflect the need for American Branch members to keep the Membership Chair apprised as to changes of address (changes of address are then forwarded to our counterpart in the UK). Overall, the outlook from Membership continues to be promising and we expect continued growth in 2023.

## 2022 Past Chair’s Report

Compton Reeves

Participated in Board discussions and votes, and provided institutional memory.

<b>Income</b>	<b>2022</b>	<b>2021</b>
Dues	\$ 29,230.13	\$ 24,233.98
Dividends	\$ 3,699.22	\$ 3,585.38
Amazon Smile (program discontinued in 2023)	\$ 167.20	\$ 171.59
Interest	\$ -	\$ -
Gifts in Kind - Goods (Library Books)	\$ 1,209.71	\$ 1,294.00
Gifts General Fund (Cash Donations)	\$ 5,904.90	\$ 3,300.00
Gifts McGee GMM Speakers Fund	\$ -	\$ -
Gifts Schalleck Special Projects Fund	\$ -	\$ -
Gifts Weinsoft Library Fund	\$ -	\$ -
GMM Registration Fees	\$ 9,250.00	\$ -
Additional Registers	\$ -	\$ -
<b>Total Income</b>	<b>\$ 49,461.16</b>	<b>\$ 32,584.95</b>
<b>Non-Cash Loss</b>		
Investment Income Unrealized Gain/Loss	\$ (26,328.99)	\$ (6,500.28)
<b>Expenses</b>		
UK Society Dues (2 membership years, '21-'22 & '22-'23)	\$ 20,552.54	\$ 9,622.73
UK Overseas Direct Mailings (2 membership years)	\$ 12,160.18	
Ricardian Register Printing/Production/Mailing Costs	\$ 4,425.75	\$ 4,252.61
Fiction Library Expense	\$ 204.71	\$ 1,294.00
Non Fiction Library Expense (includes gifts hi-value books)	\$ 1,448.59	\$ 319.29
Bank Wire	\$ -	\$ 26.07
Acc Federal NY State Tax Filing Fees	\$ 50.00	\$ 100.00
Credit Card Processing Fees	\$ 1,570.14	\$ 2,499.62
Zoom Subscriptions	\$ 193.08	\$ 194.28
Conferences & Meetings (2022 GMM expenses)	\$ 14,712.95	\$ -
Travel (Reimburse Chair's expenses for Stratford talk)	\$ 378.00	
Sales Office Expense (Office Discontinued in 2022)		\$ 185.78
Insurance (D&O premiums for 2 policy years, 2022 & 2023)	\$ 1,002.00	\$ -
Printing and Copying	\$ 68.58	\$ -
Reimbursement	\$ -	\$ 45.84
Grant to "Lost King" exhibit at Wallace Collection US 501c3	\$ 3,400.00	\$ -
Website	\$ 531.39	\$ 2,719.00

Accounting Fees	\$ 3,000.00		\$ 1,400.00
<b>Total Expenses</b>	<b>\$ 63,697.91</b>		<b>\$ 22,659.22</b>
<b>Net income</b>	<b>\$ (40,565.74)</b>		<b>\$ 9,925.73</b>
<b>Beginning Balance</b>			
Vanguard Total Bond Market Fund Indexs	\$ 171,934.13		\$ 174,849.00
Bank of America Business Fundamentals Checking	\$ 50,044.04		\$ 54,263.00
Paypal	\$ 12,615.18		\$ 7,543.00
	<b>\$ 234,593.35</b>		<b>\$ 236,655.00</b>
<b>Ending Balance</b>			
Vanguard Total Bond Market Fund Indexs	\$ 149,304.36		\$ 171,934.13
Bank of America Business Fundamentals Checking	\$ 41,086.26		\$ 50,044.04
Paypal	\$ 3,636.99		\$ 12,615.18
	<b>\$ 194,027.61</b>		<b>\$ 234,593.35</b>

Notes: Because the UK was late in billing us for the 10/2/2021-10/1/2022 CLG membership cycle, we incurred two years' worth of dues and overseas direct mailing costs in Fiscal Year 2022 to cover these expenses through 10/1/2023. We will try to ensure that the UK CLG sends us timely invoices, as we incur these expenses on 10/2 each year but cannot claim them as expenses until we actually pay the bill (we are on Cash Basis accounting).

2022 GMM Expenses were unusually high compared to past GMMs because of the 60th Anniversary celebration-related events and the extra Audio-Visual Technical costs associated with doing a Hybrid Zoom-In Person format. However, we have noted a past trend of GMM expenses exceeding income generated from GMM registration fees even before this new technology was employed.

We expect the UK CLG will be increasing its dues by almost \$4.00 per member, which will be an added expense for the American Branch in Fiscal Year 2023 (370 members x \$4 = \$1,480).

Although not included in the spreadsheet above, members should know that the Board monitors the Schallek Endowment which funds the \$40,000 in annual scholarships distributed under the Schallek Fellowship & Awards program. The initial gift was \$1,340,000. It is managed by the Medieval Academy of America's financial manager (UBS Bank) pursuant to our contract with the Academy. At year-end 2022, the value was \$1,629,000.

2022 Report from Editor

Joan Szechtman

The following publications were issued:

March and September *Ricardian Registers*, print and digital editions

June *Ricardian Chronicle*, digital edition

Miscellaneous documents (digital and print)--2021 Annual Report, GMM program, Proposed Bylaws and associated documents, and GMM Report.

Note: Both printing and shipping costs increased in 2022 and are documented in the treasurer's report.

## 2022 Report from Research Librarian

Susan Troxell

I became Research Librarian in 2015, and it has grown from 550 titles to more than 600 in 2022. Unfortunately, despite my attempts to bring members' attention to our non-fiction library, I continue to receive a low number of borrowing requests. Because of that, as well as limited storage space in my house, I have to be as judicious as possible in making new acquisitions for our library.

### Books purchased in 2022:

Tobias Capwell. *Armour of the English Knight: 1450-1500*. 2022 (2 volumes)

B.M. Cron. *Margaret of Anjou and the Men Around Her*. 2021

Katherine French. *Household Goods and Good Households in Late Medieval London*. 2021

Christopher Gravett. *Bosworth 1485, Last charge of the Plantagenets*. 2009

Katherine Lewis. *Kingship and Masculinity in Late Medieval England*. 2013

Anne Sutton, *The King's Work: The Defence of the North Under the Yorkist Kings 1471-85* (2021)

### Donations in 2022:

Two copies of Anne Sutton's *The Coronation of Richard III: The Extant Documents* were donated; one from member Carol Barnstead and one from former member Laura Blanchard. We are very grateful for these generous gifts.

We also received the Ph.D. dissertation from the 2020 Schallek Fellowship Award winner, Julia Mattison, entitled *C'est livre est a moy: French Books and English Readers in Fifteenth-Century England*.

## 2022 Report from Fiction Librarian

Pauline Calkin

A cautious approach has been taken in acquiring new materials both because of the lack of member requests to borrow books and because of space limitations. Several duplicates in the collection were sold at the used book sale at the GMM. The following volumes have been added in 2022 either as a result author donations or purchase:

*Richard with a Twist* by Kathy H.D. Kingsbury (donated)

*The King's Son* by Darren Harris

*Death at Hagminster Hall* by Richard Unwin

*I, Richard Plantagenet: The Prequel, Book Two A Vous Me Lie* by J.P. Reedman

*The Colour of Poison & The Colour of Gold: Collectors Edition* by Toni Mount (Made Global Publishing, 2022)

*The Colour of Rubies* by Toni Mount

*False Rumours* by Danae Penn

*A Mystery of Blood and Dust* by Danae Penn

*Maiden of Middleham* by Bridget M. Beauchamp

*Now and Always* by Diana Rubino (donated)

*Hawker and the King's Jewel* by Ethan Bale

*Sons of York* by Alex Marchant

*The Protector* by Kathleen M. Kelley (donated)

*At the Court of Broken Dreams* by Laurence Baillie Brown (donated)

*Richard III and the Making of a Legend* by Roxane Murph

*The War of the Roses in Fiction: An Annotated Bibliography, 1440-1994* compiled by Roxane C. Murph